



DEPARTMENT OF THE NAVY

FLEET AND INDUSTRIAL SUPPLY CENTER
JACKSONVILLE, FLORIDA 32212-0097

IN REPLY REFER TO:
FISCJAXNOTE 4235
Code 203
01 MAR 2001

FISC JACKSONVILLE NOTICE 4235

To: Distribution List

Subj: **PROCUREMENT PLANNING AND CUTOFF DATES FOR FY01**
REQUISITIONS REQUIRING PURCHASE OR CONTRACTING ACTION

Ref: (a) NAVSUPINST 4200.84C
(b) FAR Part 7.103
(c) NAVSUPINST 4200.85C
(d) SECNAVINST 5000.2B
(e) NAVSUP letter 22B/144 of Nov. 27, 2000

Encl: (1) FISCJAX FY00 Requisition Submission Deadlines
(2) FISCJAX Requirement for IT Requisitions
(3) Sample IT Review and Approval Format
(4) FISCJAX Policy for Micropurchases (<\$2500)
(5) FISCJAX Contracting Department Telephone List

1. Purpose. To improve the procurement planning process and help ensure the timely obligation of FY01 customer funds by establishing cutoff dates for receipt of purchase requests (PRs) at FISC Jacksonville and all detachments and sites.

2. Scope. This notice is applicable to all activities that submit PRs to the FISC Jacksonville Contracting Department and all detachments and sites for action.

3. Background. Reference (a) discusses Procurement Administrative Lead Time (PALT) and requires each contracting activity to annually inform its customers of current PALT forecasts and required deadline dates for receipt of purchase requests.

4. Recommendations for Procurement Originators.

a. Submit purchase requests at the earliest possible time, even prior to receipt of funds, if necessary. With proper planning, presolicitation actions can be executed and solicitations readied for issuance as soon as funds are received. The Competition in Contracting Act (CICA) which became effective 1 April 1985 requires, with limited exceptions, that procurements be competed. Competitive procurements take longer to award than non-competitive procurements; hence, the need for adequate procurement lead time is critical to both the purchase of required material and services, as well as, in the timely obligation of customer funding. Reference (b) prohibits Contracting Officers from by-passing competition due solely to a customer's lack of

advanced planning or need to obligate expiring funds. Consequently, it is important that the cutoff dates listed in enclosure (1) be incorporated into your requirements planning process.

b. Ensure that procurement packages are complete and that your requirements are clearly defined. A complete/workable purchase request allows us to provide immediate service to our customer and saves you from expending time and resources on costly rework and re-submissions.

All purchase requests must include a description of the required supplies or service adequate to permit competitive acquisition (this includes purchase requests for rental or maintenance of Information Technology (IT). In accordance with reference (c), an adequate purchase description must set forth the item's essential physical and functional characteristics. It should not be unduly restrictive and shall not specify a product peculiar to one manufacturer (e.g., brand name and manufacturer's part number) unless it is essential to the Government's requirements. The minimum acceptable purchase description (competitive) is the identification of a requirement by the use of the words "brand name or equal". (Brand name or equal cannot be used for requirements greater than \$100,000.00.) This method of description should only be used when a more detailed description is not possible and even then, the description must include those salient characteristics of the brand name product that are essential to the Government's needs. Requisitions that cite only a manufacturer's brand name and part number will be returned to the customer for a more adequate description or a sole source statement.

c. If the purchase description you provide limits the availability of the item or service to one source (sole source), the requisition must be accompanied by a full justification explaining why the item is the only one that will meet the Government's needs. This sole source statement must be attached to the requisition. Requirements over \$100,000 require a formal Justification and Approval (J&A) in the format specified in Federal Acquisition Regulation (FAR) Part 6.303-2. Sole source requirements over \$50 million must have the approval of the Commander, Naval Supply Systems Command, Mechanicsburg, PA.

d. As explained in reference (d), the focus of the Information Technology (IT) policy has changed from Life Cycle Management (LCM) to IT Capital Planning and Information Technology Acquisition Management (ITAM). Field activity authority for IT acquisition is conveyed through approval of an annual Information Technology Infrastructure Abbreviated Acquisition Program (ITIAAP) Plan. The required ITAM documentation for these requirements is an ITIAAP plan. See enclosure (2) for FISC JAX requirements for IT requisitions (includes computer hardware and software, data, or telecommunications that performs functions such as collecting, processing, transmitting and displaying information) submitted for processing.

e. In addition to the above IT policy, the Navy-Marine Corps Intranet (NMCI) contract was awarded on October 6, 2000 and commands will begin to transition from their current network to NMCI. The NMCI contract contains a wide range of Contract Line Items (CLINs) which may potentially be ordered. Only some of these are fully defined and priced at this time: CLINs 0001-0013, 0016-0018, 0020-0022 and 0024-0027, covering basic and enhanced fixed and portable seats, enhanced connectivity, and moves, adds and changes. Flag/SES level reviews of

IT requirements covered by these CLINs are required. For priced CLINs and descriptions go to www.eds.com/nmci/catalog.htm. For the remainder of NMCI contract CLINs, further contractual steps must be taken before an order may be issued. The NMCI contract is not a mandatory or preferred source for these requirements and DON activities may obtain these requirements from other sources. Accordingly, Flag/SES level reviews are not required for these requirements although NMCI should be considered as an available source in acquisition planning. If a review concludes that a requirement may be satisfied by other than the NMCI contract because it is clearly needed before it can be delivered under the NMCI contract, verification by the PCO that the NMCI contract schedule cannot be modified is not required. This restriction applies to GSA Schedule orders and delivery orders under Indefinite Delivery Type contracts as well as new purchase orders and contracts. Requisitions submitted without the appropriate review and approval shall be returned. Exceptions to this review are listed on the sample IT Review and Approval Form provided as enclosure 3. NAVSUP claimant activities (NAVICP, FISC's, FOSSAC, FMSO, NAVTRANS, etc) shall submit their internal IT requirements over \$25,000 for review to NAVSUP. Non-NAVSUP claimant activity's requirements will be reviewed within the activity's chain of command, whether the activity will be purchasing the items directly or submitting a requisition to another activity.

f. After identifying your required delivery date, consider both PALT and manufacturing time or service start-up time to determine the date by which you must submit your purchase request to FISC in order to ensure timely/delivery and obligation of funds. Remember, purchase requests must be submitted early enough to allow sufficient time for the procurement process and manufacturing or start-up time.

g. Requirements over \$25,000, and not available on GSA schedule, take longer to process even under Simplified Acquisition Procedures (SAP). They must be synopsized for at least 15 days before the Request For Quotation (RFQ) can be issued. The RFQ is open from five (5) to fifteen (15) days, depending on the complexity of the requirement, and all responses must be evaluated, which can take several days. It is not simply a matter of calling three sources for prices and awarding in a day or two, it can take up to 35 to 40 days. Keep this in mind if your requirement is in excess of \$25,000 and not on GSA contract. Our Contracting Officers are available for advanced procurement planning and you are encouraged to communicate your needs to them as early as possible.

h. Establish contract options for subsequent year's requirements to ensure prompt obligation of funds with minimal administrative effort.

i. Purchases less than \$2500 (Micro Purchase) are to be made by the customer using customer Government-wide Commercial Purchase Card (GCPC). Requirements less than \$2500 will only be accepted, with appropriate written justification, to be purchased by FISC, see enclosure (4).

5. Action.

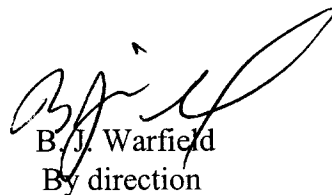
a. Activities should use the PALT and cutoff dates listed in enclosure (1) to plan their submission of purchase requests. The PALT shown is measured in days from receipt of a proper, complete and workable purchase request as addressed above and represents an average for procurements of that particular type and category.

b. Activities should ensure that their purchase requests are received at this Command no later than the cutoff date established in enclosure (1). These dates allow for the increase in procurement workload normally experienced toward the end of the fiscal year and are not a reflection of normal PALT alone. If an urgent operational requirement necessitating procurement action arises after the applicable cut-off date, the requisition should be delivered directly to the FISC Jacksonville Customer Service Officer along with a description of the circumstances requiring the emergency procurement and exception to the established cutoff date. Each requirement will be reviewed on a case-by-case basis to determine if it can be completed before the end of the fiscal year, and you will be notified accordingly.

c. At the end of each fiscal year, several thousand agreements for rental/lease/maintenance of various equipment and services expire and require renewal on 1 October. In addition, many new requests are submitted. To ensure these requirements are placed in as timely a manner as possible, activities are urged to submit their purchase requests as soon their FY02 purchase requirements are known. These documents should cite FY02 funds with the statement "Subject to the Availability of Funds". Also, please ensure that your FY02 document number uses the Julian date 1274.

6. Our aim is to meet our customers' contracting requirements by getting you what you need, when and where you need it. With proper planning, communications, and teamwork, we will accomplish those expectations.

7. Dissemination. It is requested that this information receive wide dissemination within your command, as well as periodic publication in the Plan of the Day, and posting on command or divisional bulletin boards.


B.J. Warfield
By direction

Distribution:

FISCJAXINST 5605.1J, List B

Special:

FISC Contracting Personnel and FISC Partners

FISCJAX SAP Sites: Mainsite Jacksonville, Mayport, FL, Kings Bay, GA,
Pascagoula, MS, Charleston, SC, Corpus Christi, TX,
Ingleside, TX, and Kingsville, TX

FISCJAX FY01 REQUISITION SUBMISSION DEADLINES

The following deadline dates will apply to any requisition requiring purchase action by FISC Jacksonville in FY01:

<u>Estimated Value of Procurement</u>	<u>Priority</u>	<u>Deadline</u>
\$1 Million or more (including options)	All	30 Mar 01
\$100,000 to \$1 Million (including IT)	All	15 May 01
\$25,000 to \$100,000 Rental/Maintenance	All	01 Aug 01
\$25,000 to \$100,000 Non-GSA	All	15 Aug 01
Under \$25,000 FY02 Rental/Maintenance Renewals and new Requirements	All	31 Aug 01
\$25,000 - \$100,000 Available on GSA Schedule	All	14 Sep 01
Under \$25,000	4-15	21 Sep 01
Under \$25,000*	1/2/3	29 Sep 01
*NOTE: If purchase card eligible, submit required documentation in accordance with current rules & regulations.		

Note: Every effort will be made to process all requirements, time permitting. Requisitions submitted after normal cut-off dates will be processed based upon priority and end of Fiscal Year time constraints. Every effort should be made to submit requirements within the established cut-off dates in order to ensure timely processing of requirements and obligation of funding.

Enclosure (1)

The focus of the Information Technology (IT) policy has changed from Life Cycle Management (LCM) to IT Capital Planning and Information Technology Acquisition Management (ITAM). Field activity authority for IT acquisition is conveyed through approval of an annual Information Technology Infrastructure Abbreviated Acquisition Program (ITIAAP) Plan. The required ITAM documentation for these requirements is an ITIAAP plan. Requirements for IT requisitions includes computer hardware and software, data, or telecommunications that performs functions such as collecting, processing, transmitting and displaying information.

FISC JAX REQUIREMENTS FOR IT REQUISITIONS SUBMITTED FOR PROCESSING ARE:

FOR SAP REQUIREMENTS (up to \$100,000)

The statement on each requisition that it is IAW (activity's) approved annual ITIAAP plan.

FOR LARGE PURCHASE REQUIREMENTS (>\$100,000)

A copy of the first page and the signature page of the activity's approved annual ITIAAP plan.

Enclosure (2)

Information Technology-Related Procurement Review and Approval

Activity: _____

Procurement Description: _____

Procurement Dollar Value: _____

Procurement Award Date: _____

This IT Procurement is in excess of \$25,000 and does not include requirements for:

- A. Local voice services
- B. Top Secret or compartmentalized information
- C. Cryptologic-related activities related to national security systems
- D. Computer resources (hardware and software) that are physically part of, dedicated to, and essential to the performance of a weapons systems or shipboard system associated with the IT-21 effort.

NOTE: Embarkable/deployable workstations, portable computers, laptop computers, etc. are not included in the above exemptions.

_____ Waiver to use other than the NMCI contract is approved based on IT capabilities being unavailable under the NMCI contract.

_____ Waiver to use other than the NMCI contract is approved based on the requirement being essential to the successful execution of a command program initiative that is clearly needed before it can be delivered under the NMCI contract.

_____ Waiver to use other than the NMCI contract is approved for IT services for which the period of performance will expire before transition to the NMCI contract, (or a reasonable time thereafter as agreed by the NMCI Government Management Office and requesting official (see attached email, FAX, etc. agreement by the NMCI GMO)).

Approved:

Flag Officer/SES

Date

Enclosure (3)

DOCUMENTATION REQUIRED FOR MICROPURCHASES (<\$2500)

In accordance with NAVSUP policy letter SA99-16, dated 08 APR 99, the requiring customer shall ensure that purchase requests forwarded to the supporting purchasing office include a written statement either on the face of the purchase request or as a separate document, detailing one of the following circumstances:

1. "The following vendor(s) were contacted and refused to accept the purchase card." This statement is the only one that may preclude the use of the purchase card. The requiring customer shall identify at least two vendors contacted who refused the acceptance of the purchase card (only one vendor required on sole source requirements). If the buyer, at the supporting purchasing office, locates a vendor that will accept the purchase card, the purchase request shall be returned to the requiring customer to utilize their purchase card and complete the transaction. Prior to issuing any type of award/order valued at or below \$2500, the supporting purchasing office is responsible for preparing and obtaining the approval of a written determination. The only written determination authorized for processing purchase orders, orders under task and delivery order contracts, orders under basic ordering agreements or calls against blanket purchase agreements, (when not utilizing the purchase card on a stand alone basis or as the method of payment) is, "the source or sources available for the supply or service do not accept the purchase card and the contracting activity is seeking a source that accepts the purchase card." (In accordance with OUSD (A&T) memorandum of 2 October 1998.)

2. "The requested supply or service requires written terms and conditions". The requiring customer shall list the written terms and conditions and reasons therefore. The purchase request shall also state if the Government Commercial Purchase Card will be used as the method of payment. The purchase request shall state the name of the cardholder and telephone number.

Any questions to the above, please call Carolyn King (904) 542-1250 or Ingrid Williams (904) 542- 1076.

Enclosure (4)

FISC JAX CONTRACTING DEPARTMENT TELEPHONE LIST

FAX: (904) 542-1087

COMM: (904) 542-XXXX

DSN: 942-XXXX

CONTRACTING

Bobby Warfield, LCDR

Director of Contracting

542-1073

Larry Bergeron

Deputy Director of Contracting

542-1000 X 174 or

542-1065

LARGE PURCHASE DIVISION

FAX: (904) 542-1098

Fran Kennedy

Division Manager

542-1062

Rebecca Washington

Contract Specialist

542-1162

Bill Reid

Contract Specialist

542-1246

Victoria West

Contract Specialist

542-1253

Kay Eichholz

Contract Specialist

542-1063

Jackie Jackson

Contract Specialist

542-1264

Brenda Norris

Contract Specialist

542-1139

Jackie Woloscheck

Contract Administrator

542-1248

Len Moran

Contract Administrator

542-1079

Margaret Fenn

Procurement Technician

542-1070

Ryan Mullins

Contract Specialist (Intern)

542-1256

Rolando Turner

Contract Specialist (Intern)

542-1166

POLICY AND ANALYSIS DIVISION

FAX: (904) 542-1096

Janell Palmer

Division Manager

542-1251

LaVerne Clark

Procurement Analyst

542-1265

Cassandra (Sandy) Roberts

Procurement Analyst

542-1255

Jim Hamm

Management Analyst

542-1257

VOUCHER PAYMENT

FAX: (904) 542-0142

Shirl Williams

Voucher Examiner

542-0147

Vernice Clements

Voucher Examiner

542-0148

Debrah Lewis

Voucher Examiner

542-0146

David Toffolio

542-1219

SIMPLIFIED ACQUISITION PROCEDURES**FAX: (904) 542-0927**

Carolyn King	Manager	542-1250
Mattie Washington	Procurement Analyst	542-1254
Ingrid Williams	Purchase Card Program	542-1076

MAIN SITE/NADEP OFFICE**FAX: (904) 542-1163**

Edwin Wilcher	Manager	542-1082
Carol Foulk	Purchasing Agent	542-1072
Sheila Pearson	Purchasing Agent	542-1140
Gladys Callahan	Purchasing Agent	542-1067
Venita Harmon	Purchasing Agent	542-1229
Clarice Poitier	Purchasing Agent	542-1132
Bobby Mathews	Purchasing Agent	542-1083

MAYPORT SITE**FAX: (904) 270-6498**

Mary Hart	Purchasing Supervisor	270-5699 X 150
Kathy Frisko	Purchasing Agent	270-5699 X 146
Judy Hopper	Purchasing Agent	270-5699 X 147
Luis Navarro	Purchasing Agent	270-5699 X 156
Susan Pierce	Purchasing Agent	270-5699 X 153
Ellen Reich	Procurement Technician	Fla Relay Service
		Dial 1-800-955-
		8770 (Voice) via
		270-6497 TDD

PASCAGOULA SITE

Alisa Murray	Purchasing Agent	DSN 358-2009
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CORPUS CHRISTI SITE**FAX: (361) 961-2394**

Lino Vera	Supervisory Contract Specialist	DSN 861-3661/3662
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Corpus Christi

Baldomero Garza	Purchasing Agent	DSN 861-3878
Jesse Garcia	Purchasing Agent	DSN 861-3877
Larry Claridge	Purchasing Agent	DSN 861-2345

Kingsville

Joe Dominguez	Purchasing Agent	DSN 876-6168
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Ingleside

Marie (Lynda) Gaunt	Purchasing Agent	DSN 776-4533
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CHARLESTON SITE**Lori Wilhite****Purchasing Agent****DSN 794-7180****KINGS BAY SITE****FAX: (912) 673-2007****Dan Seep, LCDR****OIC/Site Director****DSN 573-2001 X 2561****Darlene Kunde****Deputy OIC****DSN 573-2001 X 2124****Paul Ison****Contract Specialist****DSN 573-2001 X 3809****Amanda Butler****Customer Liaison****DSN 573-2001 X 9931****Gianna Livingston****Procurement Technician****DSN 573-2001 X 6559****Small Purchase****FAX: (912) 673-2659/2191****Donna Hill****Lead Purchasing Agent****DSN 573-2001 X 2656****Carolyn Wilson****Lead Purchasing Agent****DSN 573-2001 X 9283****Juliet Bohannon****Purchasing Agent****DSN 573-2001 X 3800****Andrea Brown****Purchasing Agent****DSN 573-2001 X 4422****Nina Miller****Purchasing Agent****DSN 573-2001 X 6963****Carolyn Walker****Purchasing Agent****DSN 573-2001 X 8517****Alice Settle****Purchasing Agent****DSN 573-2001 X 2665****Tracy Green****Purchasing Agent****DSN 573-2001 X 3805****SMALL BUSINESS****FAX: (904) 542-1099****Glenda Rife****Deputy for Small Business****542-1143****Carolyn Williams****Small Business Specialist****542-1031****Margaret Ray****Procurement Technician****542-1143****FISC COUNSEL****FAX: (904) 542-1100****Phil Adams****Counsel****542-1260****Kathy Tinkler****Paralegal****542-1128****Sharon Key****Legal Technician****542-1127**